
Project Management Office

Training Plan for Grants, Contracts, and Loans Management System

Revision #1.2

Office of Financial Management

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Overview

This document describes the process the Grants, Contracts, and Loans Management (GCLM) system project will follow to train the people who will use GCLM upon implementation of the O&PEN system for agreements management in the Departments of Ecology (ECY) and Community, Trade and Economic Development (CTED).

Training Scope

Training for this project will include:

- Training before user acceptance testing (UAT). This training will help testers evaluate the system's fit to their agreement management needs during UAT.
- Training before the system is implemented to manage agency agreements. This includes both the first and second planned rollouts of O&PEN.
- Trainer orientation.

Both kinds of training are critical to the successful implementation of O&PEN.

Training Objectives

The objective of GCLM training is to enable both external and agency agreements management stakeholders to use the O&PEN system independently.

Training Requirements

Training will be conducted in a training room that has computers with access to the fully configured O&PEN system, i.e., with access to the state intranet.

The Training Team will determine the staff to train and the best method for each type of staff. They will insure that representatives of all user roles are confident using the system. User roles to be addressed will include:

- Agency agreements management staff in various roles including agreements management, fiscal management, evaluators, and others
- Agency system administrators
- OFM system administrators
- Providers, including local governments and the public
- Organizations acting on behalf of providers
- Trainers for the above roles

Training methods will include:

- Formal, OGMA instructor-led training sessions based upon training materials, examples and data that are relevant to the participants
- Supervised workshops where the OGMA instructor acts as a resource to trainees who work through problem examples that are consistent with their routine business processes.

- Independent, self-directed and self-paced exercises that are supported by an OGMA trainer and OGMA training resources
- Use of a pre-production version of O&PEN made available to selected users to gain familiarity and provide feedback
- References to O&PEN documentation and on-line help
- References to GCLM newsletters and reports

A schedule for training will be set after the 45-day evaluation period has successfully passed.

Roles and Responsibilities

Executive Sponsor / Executive Steering Committee

Sadie Rodriguez-Hawkins, Jan Marie Ferrell, Polly Zehm

- Reviews and approves high level training schedule
- Ensures any additional resources, as needed, are available

Project Manager

Doug Beam

- Approves the detailed training schedule, including user groups and methods
- Assigns any issues arising from the training schedule
- Assigns any risks arising from the training schedule
- Assists in securing additional resources, if necessary
- Makes necessary updates to project plan

Product Manager

Owen Barbeau

- Identifies user roles and users to be trained
- Coordinates decision on appropriate training methods for users to be trained
- Sets and updates the training schedule
- Forwards recommended training schedule to Project Manager
- Assures all user roles are appropriately trained
- Distributes system materials to users whose training does not require specific sessions
- Prepares user documentation and other user self-help documentation
- Documents results of training, including potential issues and changes
- Forwards issues and changes to Project Manager
- Leads Training Team
- Evaluates training
- Plans for ongoing training after implementation

Training Team

Owen Barbeau, Liz Saylor, Jason Henderson, Christi Johnson, Travis Nation, Rick Castro, Sierra Systems, OGMA Consulting

- Reviews user roles and users to be trained
- Decides appropriate training methods for users to be trained
- Assists with training sessions
- Assists the Product Manager documenting the results of the training sessions
- Makes recommendations to Project Manager

Trainers and Training Support Staff

OGMA staff

- Trains staff in formal, instructor-led sessions
- Leads supervised training workshops
- Supports independent, self-directed and self-paced training exercises
- Prepares system documentation based on specific system configuration
- Updates training materials as system configuration changes during the project

Trained Trainers

Agency staff to be determined

- Learns system with intent to train staff in his/her respective agency

Training Evaluation

The GCLM Product Manager will be responsible for evaluating GCLM training throughout the project. Training materials and methods will be updated based on evaluations of past training.

Training Strategy

The GCLM Product Manager, working with the Training Team, will determine the users to be trained and the methods, listed under Training Requirements, best used to train them.

Training Sources

OGMA Consulting Company, as the architects and developers of the O&PEN system, will provide training on the O&PEN system.

Dependencies/Constraints/Limitations

Because there are many stakeholders for the project and many users expected to need training, it will be important to plan training as early as possible to get training sessions on staff calendars. Also, training facilities book up months in advance.

Training will be limited to the sessions described under scope.

Training Resources

OGMA projects that business users of O&PEN may be trained in two days, and administrative users of O&PEN may be trained in three days. Providers have used O&PEN effectively without any training at all; however, Sierra/OGMA will work with the Training Team to make sure providers are well prepared to use O&PEN before implementation.

The Training Team will assist with training sessions and with documenting the results of the sessions.

The agencies will designate trainees who will also serve as trainers for their agencies.

Prior to and during training the O&PEN database will be restored to allow training entries and potentially to accommodate system changes. This may require intervention by the OFM database administrator.

The agency hosting instructor-led sessions or workshop sessions will need to assure the facility's equipment is in working order.

Training Environment

Training will require an environment where users of the system can access work uninterrupted with a tested, non-production version of the system and database.

Staff to be trained will be instructed to bring with them documentation of agreements that will help them become familiar with the features and navigation of the system.

Technical specifications for the training environment will be detailed after the system is configured.

Training Materials

Training materials will include documentation delivered with the configured system:

- On-line help within O&PEN that is context-sensitive

- An internal user guide for using O&PEN
- An administration and system configuration manual for O&PEN
- An operations guide that includes instructions on day-to-day operations, periodic activities and a programmer's guide

In addition, OGMA has prepared lesson plans for different system features. They will update those lesson plans for the configured system.

Updating Training Materials

As the O&PEN system is enhanced, OGMA will update system, user, and specific training documentation as needed.

Acceptance

We, the undersigned project members, have reviewed this document and approve its contents. Acceptance signatures are contained in a separate document.

Name and Title	Signature	Date
Sadie Rodriguez-Hawkins Executive Sponsor		
Jan Marie Ferrell Executive Steering Committee		
Polly Zehm Executive Steering Committee		
Lynne McGuire Business Manager		
Doug Beam Project Manager		

Appendix A: Revision History

<u>Revision</u>	<u>Date</u>	<u>Author</u>	<u>Description of change</u>
1.0	02/26/2008	Doug Beam	Created
1.1	3/24/2008	Doug Beam	Updated with suggestions from Sierra.
1.2	7/29/08	Anwar Wilson	Changed Susan Dodson to Owen Barbeau.